



OnBase Job Aid

Effective Date on change of process from scanning to OnBase: October 24, 2019

Purpose: Provide reference on how to import and retrieve Contracts, Contract Changes, SMAs, and Miscellaneous documents needed by Financial Operations Section. OnBase is replacing the previously used scanning function by FIIPS coordinators and region staff to load documents for the Financial Operations Section (FOS). Documents should no longer be bar coded and scanned to the N:drive.

Access to OnBase:

Read only – *Read only access to all FOS Document Types, Custom Queries and Document Retrieval.*

Read and Import – *Read access as noted above and can import certain document types.*

- *FOS-Agreements*
- *FOS-Contract*
- *FOS-Contract Change Orders*
- *FOS-Miscellaneous*

Changes to Security for OnBase or functional system questions, please contact Cody Castillo or Kieu Vu.

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Production Web Client Access

Access OnBase Utility Web Client: <https://unitydot.wi.gov/appnet/Login.aspx>.

Log in to OnBase using your AD User Name and Password. Click Login.

A login form with three input fields. The first field is labeled "AD" and contains the text "AD". The second field is labeled "DOTXYZ" and contains the text "DOTXYZ". The third field is labeled with a password icon and contains a series of dots. Below the fields is a blue "Login" button.

Document Import

To import a document, click the ellipses  in the upper left of page which will give you a list of items to choose from. Under Document, select Import Document.

A screenshot of the OnBase web client interface. At the top, there is a blue bar with a white ellipses icon and the text "New Form". Below this, there is a list of items under the heading "DOCUMENT". The items are "Document Retrieval", "Custom Queries", "New Form", "Import Document", and "Documents Checked Out". The "Import Document" item is highlighted with a red rectangle. Below the "DOCUMENT" section, there is a section titled "WORKFLOW" with the item "Open Workflow". At the bottom, there is a section titled "USER" with the items "Mailbox" and "Locked Objects".



Once selected, you will see a new page with “Import” tab on the top. You can select a file by clicking the “Choose File” or dragging a file from your desktop or another folder to the left of the page.

Import Document

Select File

Choose File

No file chosen

Import Settings

Document Type Groups

<All>

Document Types

FOS - 218 Documents

File Type

Image File Format (.???)

☒ Initiate Workflow

Document Date

10/30/2019

KEYWORDS

Project ID

Federal ID

FOS Project Description

Import

The Document Type for an SMFA is "FOS-Agreements".

The File Type for an SMFA is "PDF".



Once a document has been imported, it will display on the preview screen, on the right of the page for reference.

From here, you will need to add indexing values. This is the new step needed to identify the document.

- **Document Type Group:** DBM – FOS Documents
- **Document Type:** This is the category of the document. The Document Type is used to identify what keywords need to be entered and if the document needs to go through workflow.
 - Most commonly used document type will be:
 - FOS – Agreements
 - FOS – Contract Change Orders
 - FOS – Contracts
 - FOS – Miscellaneous Documents
- **File Type:** This field will auto populate based on the document you've imported.
- **Document Date:** this field will default to today's date.
- **Keywords:** This will change based on which document type you have selected.
 - Document Type: *Contracts*
 - **A valid Project ID is required for all document types.** The Project ID must begin with 395 and the 8-digit project id, no dashes (example: 39512345678), click Tab. **If the Project has more than one Project ID, use the lowest Project ID first.** You can also add additional Project IDs by clicking on the "Project ID", which will create additional Project ID lines. There isn't a limit on the number of additional lines you can add.
 - Once the Project ID has been entered, if there is a Federal ID associated with the Project, it will populate. The "**FOS Project Description**" field should also auto populate with the Project Description and ID.
 - **If the "FOS Project Description" does not auto populate, press the "F6" key. Make sure the cursor is in the "Project ID" field when you press the "F6" key. There will be a slight delay for the system to refresh/acquire the data.**
 - Purchase Order – not required
 - Process Date – not required
 - Email – not required
 - Once all required fields have been entered, you can click "Import" box at the bottom of page. You will get a notice at the top of the page document was successfully imported.

This is the step that hasn't been working for me lately.

- Document Type: *Contract Change Orders*
 - Same information as Contracts, with additional required field, the Contract Modification Number.
 - Each contract modification has to be imported separately because the **contract mod number field is required (Example: 5)**

To import a new document, there are multiple options using the icons to the left of the Import Box.

- Clear Imported Documents – will keep the current Project ID, Federal ID and FOS Project Description but clear out the previous document. Good to use when importing projects with multiple mods. All the information remains the same, you need to just update the Contract Modification field with the appropriate number.



- Clear All – clears all the fields



- Clear Keywords



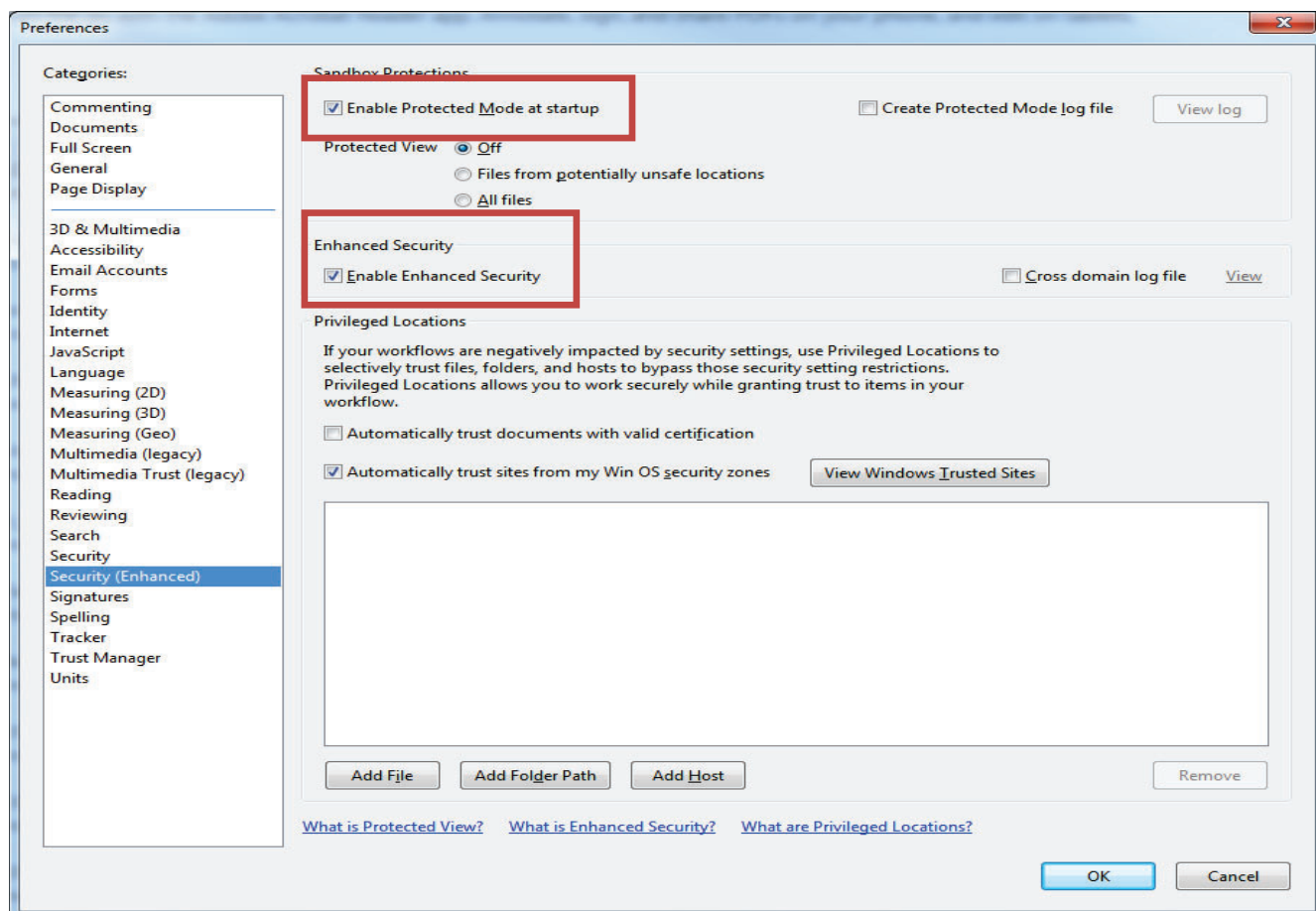


Importing Multiple Documents at Once (Drag and Drop)

This functionality allows you to select one or multiple documents in a folder and drag them onto the OnBase Import screen to process them into OnBase. You will select the applicable Document Type Group and Document Type, then enter values for the appropriate keywords. Once this is done, the documents are available for immediate retrieval.

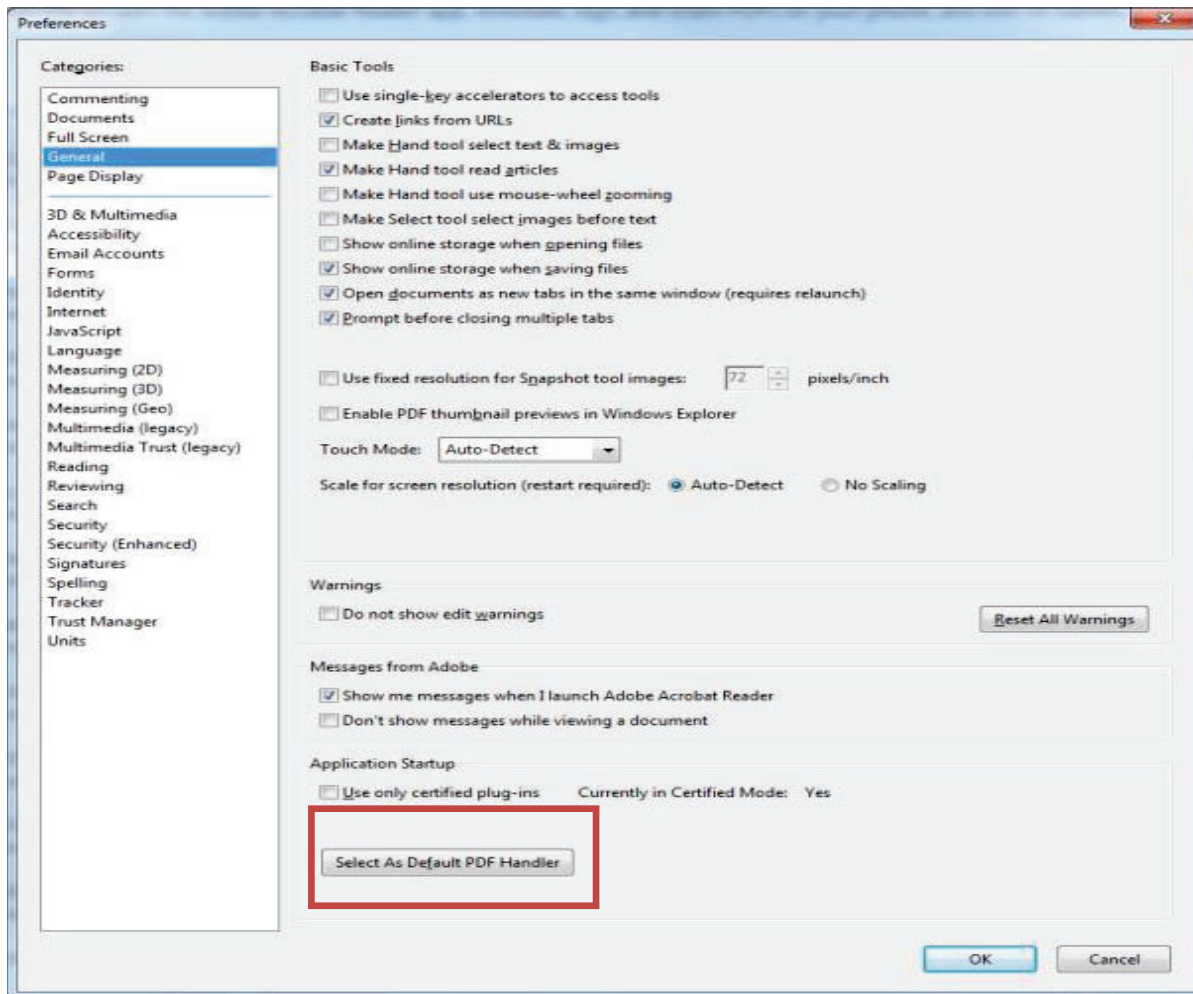
NOTE: The following settings are needed in **Adobe Reader** to use this functionality. Adobe Pro is not compatible with OnBase and will not reliably work for this functionality.

- Open Adobe Reader.
- Select Edit | Preferences | Security (Enhanced) | and check 'Enable Protected Mode at startup' and 'Enable Enhanced Security'.
- Click OK.



Select Edit | Preferences | General and click on 'Select as Default PDF Handler'.
Click OK.

Exit Adobe Reader.

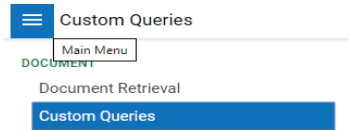




Document Retrieval

Custom Queries

Custom Queries can be used to find and retrieve specific documents. Custom Queries can be accessed from the ellipses in the upper left and selecting “Custom Queries”.



The “DBM – FOS Document” custom query has been configured to allow for searching across all FOS Document Types across the following keywords:

Date Options

From	09/01/2019	To	09/30/2019
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Project ID	<input type="text"/>
Federal ID	<input type="text"/>
Process Date	<input type="text"/>
Purchase Order	<input type="text"/>

Any of the keywords can take a wildcard if certain information isn’t known. For example, if you think a Purchase Order number starts with 123, but don’t know the rest, the wildcard “*” can be entered to allow for a less restrictive search .

Document Retrieval

Document Retrieval is another way to find documents. It can be accessed from the ellipses in the upper left and selecting “Document Retrieval”.

➤ Document Retrieval requires you to select which document type you want to search through. Multiple can be selected by holding the Shift key at the top of the range and selecting the bottom of the range while still holding the shift key, or multiple can be selected that are not together by using the Ctrl key.



- Once Document types have been selected, a list of common keywords will be displayed which can be used to further narrow the search results.
- Once document types and keywords have been entered, click “Find”

Note: Any of the keywords can take a wildcard if certain information isn’t known. For example, if you think a Purchase Order number starts with 123, but don’t know the rest, the wildcard “*” can be entered to allow for a less

123*

restrictive search

The screenshot shows the 'Document Types and Groups' section with a dropdown menu expanded, listing various document types including FOS - Invoices, FOS - Miscellaneous Documents, FOS - Pay Estimates, FOS - Receipts, and FOS - Redistributions. Below this, the 'Keywords and Date Range' section is visible, featuring input fields for Project ID, Federal ID, FOS Project Description, Purchase Order, Process Date, and Invoice Type, along with 'From' and 'To' date range selectors.

Document retrieval will also allow you to search on keywords that are specific only to a specific document type. For example, the “FOS-Invoices” document type has an “Invoices Type” that can be searched. This keyword is not present in the custom query.

Re-Index

Regional staff can only re-index document types that you are able to import. This is only done if the document has already been imported into OnBase.

When you retrieve a document and right click on a document, you will see the option to re-index.

- Depending on the document type, clicking “Re-Index” will allow you to change the keyword values of the document. A new window will open where you can change or update the keywords. After you have changed the keywords you wish to change, click “Re-Index”.

